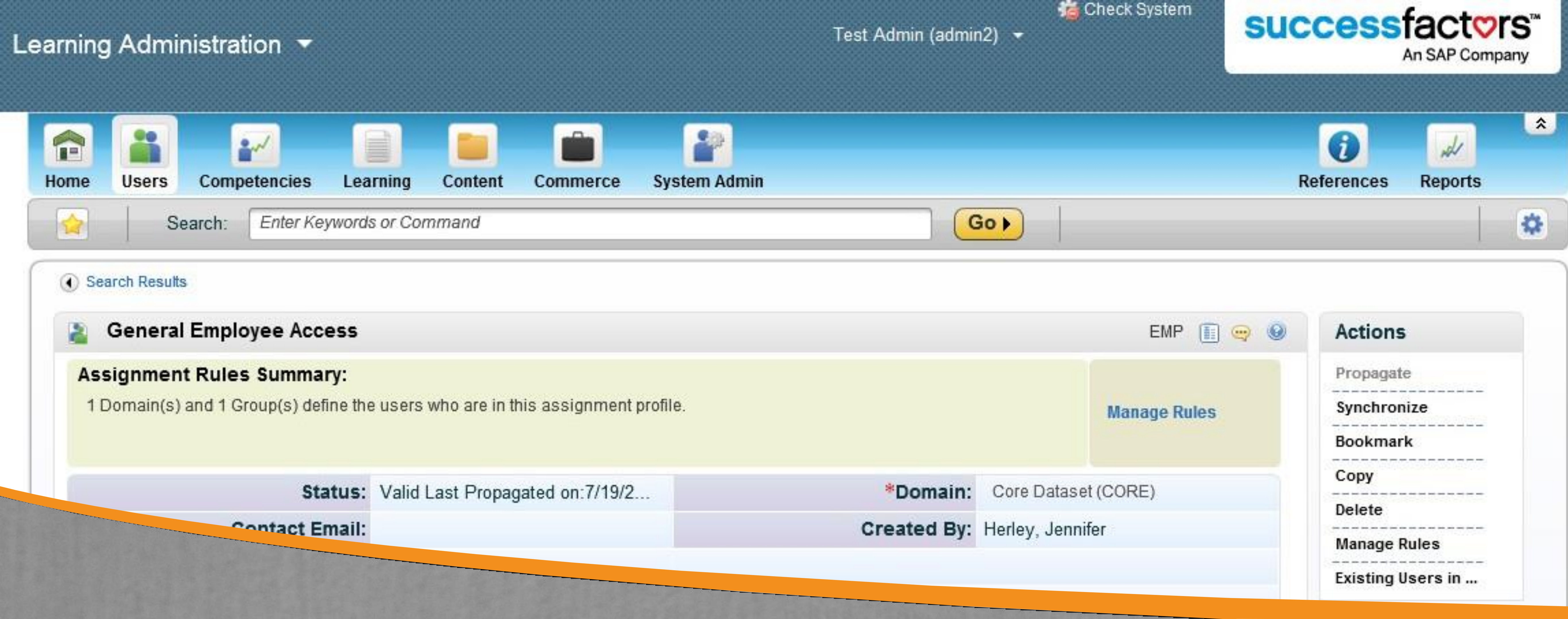


Learning Assignments

Assign training items to users in SuccessFactors Learning.

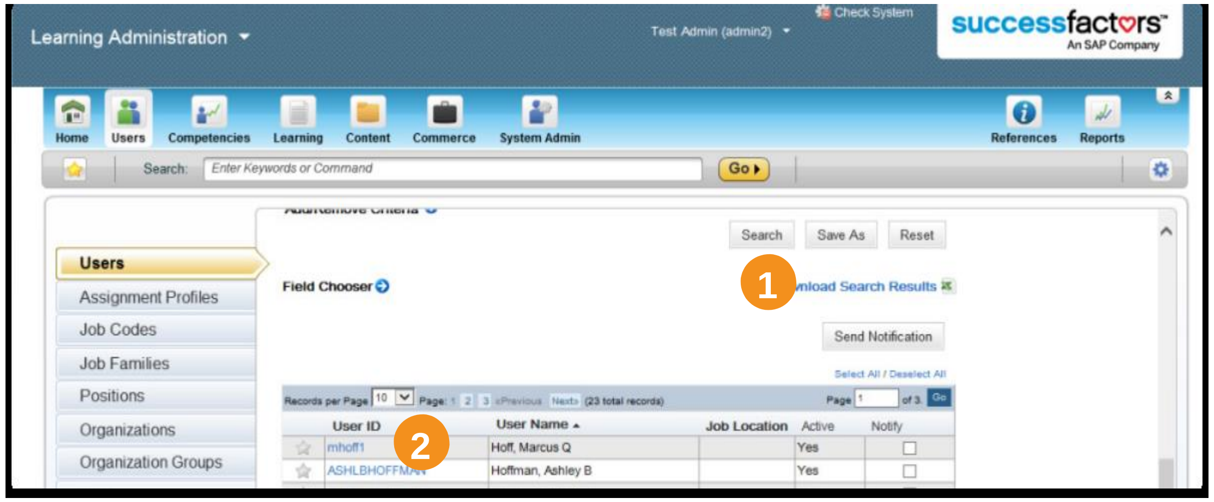
SUCCESS ACADEMY

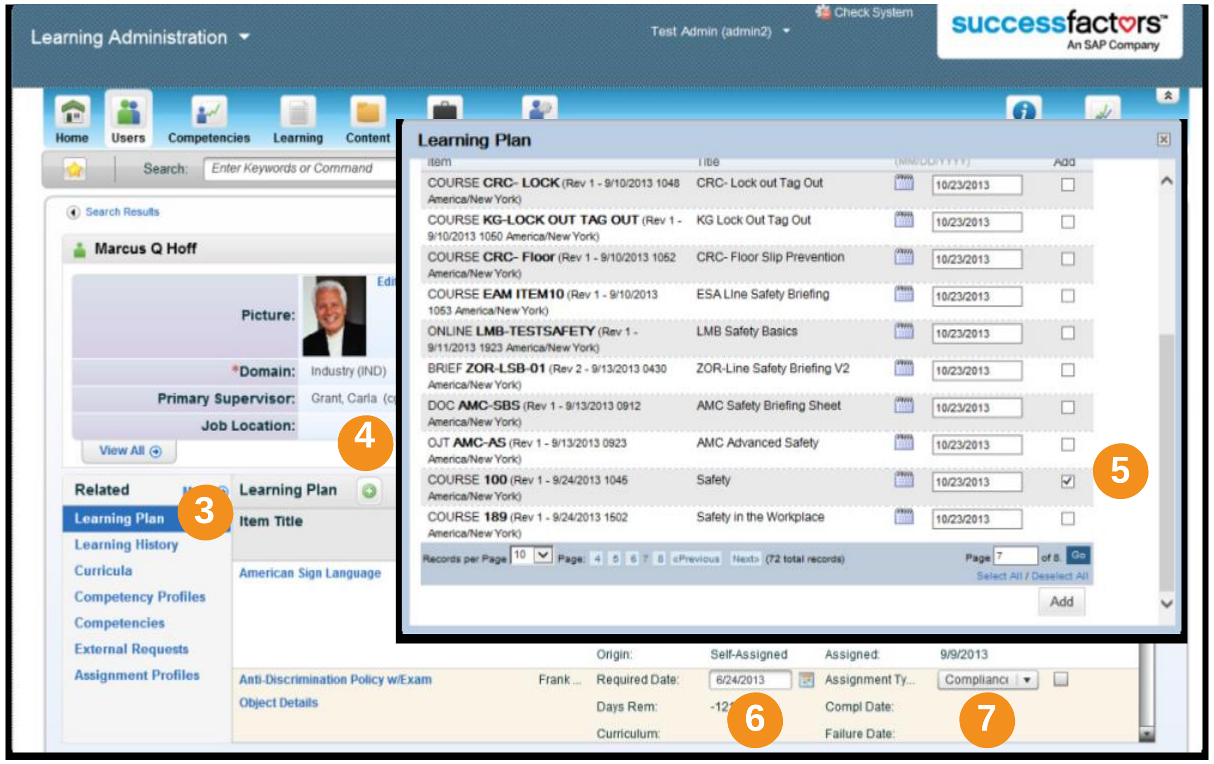
Manual Learning Assignments: Step by Step

Assigning an Item Using the Learning Plan Tab

***Admin Tools* > *Learning* > *Learning Administration* > Learning > Users**

1	Enter criteria to search for the user to whom you will assign the item and click ***Search***.
2	Click the ***User ID*** link from the search results.
3	Select the ***Learning Plan*** tab in the ***Related*** area.
4	Click the ***Add New Learning Plan*** button.
5	Click the ***Add*** checkbox next to the item(s) to add, and click ***Add***.
6	Add/edit the ***Required Date*** using the calendar icon.
7	Select an assignment type from the drop-down menu.



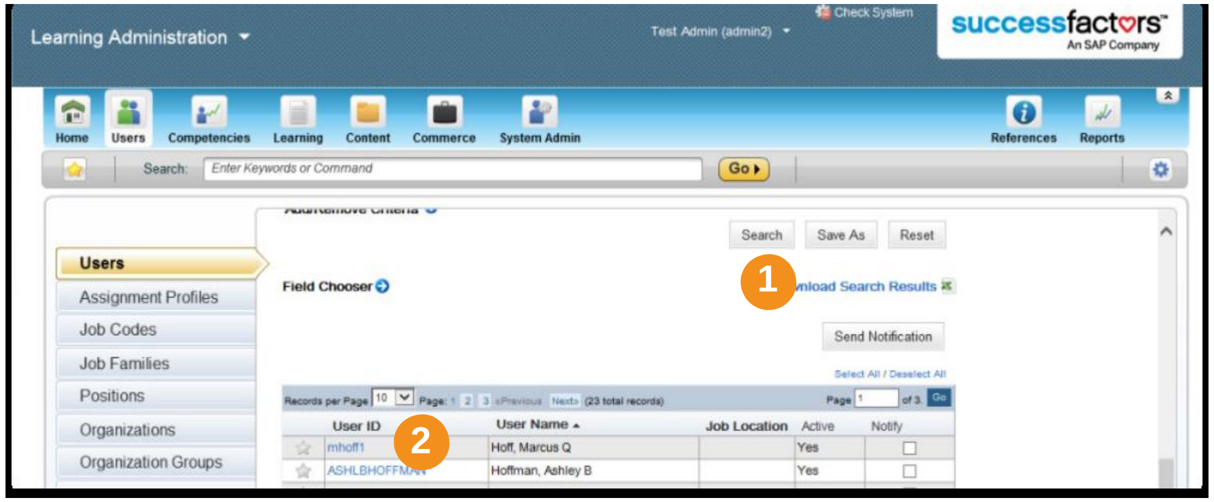


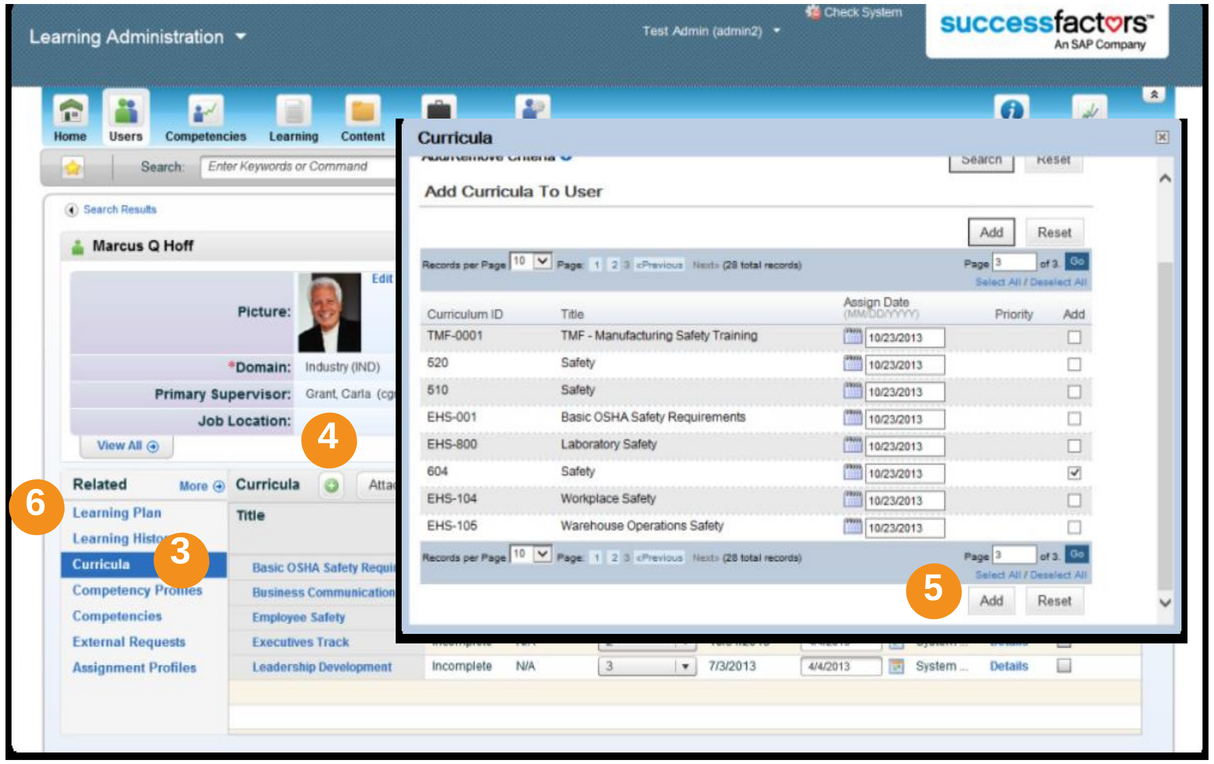
Manual Learning Assignments: Step by Step

Assign Curricula Directly to User Record

***Admin Tools* > *Learning* > *Learning Administration* > Learning > Users**

1. Enter criteria to search for the user to whom you will assign the item and click ***Search***.
2. Click the ***User ID*** link from the search results.
3. Select the ***Curricula*** tab from the ***Related*** area.
4. Click the ***Add New Curricula*** button.
5. Click the ***Add checkbox*** next to the curricula to add and click ***Add***.
6. Verify that the curricula are added to the user record, then select the ***Learning Plan*** tab from the ***Related*** area to view the items that are added to the user's learning plan based on the curricula added.



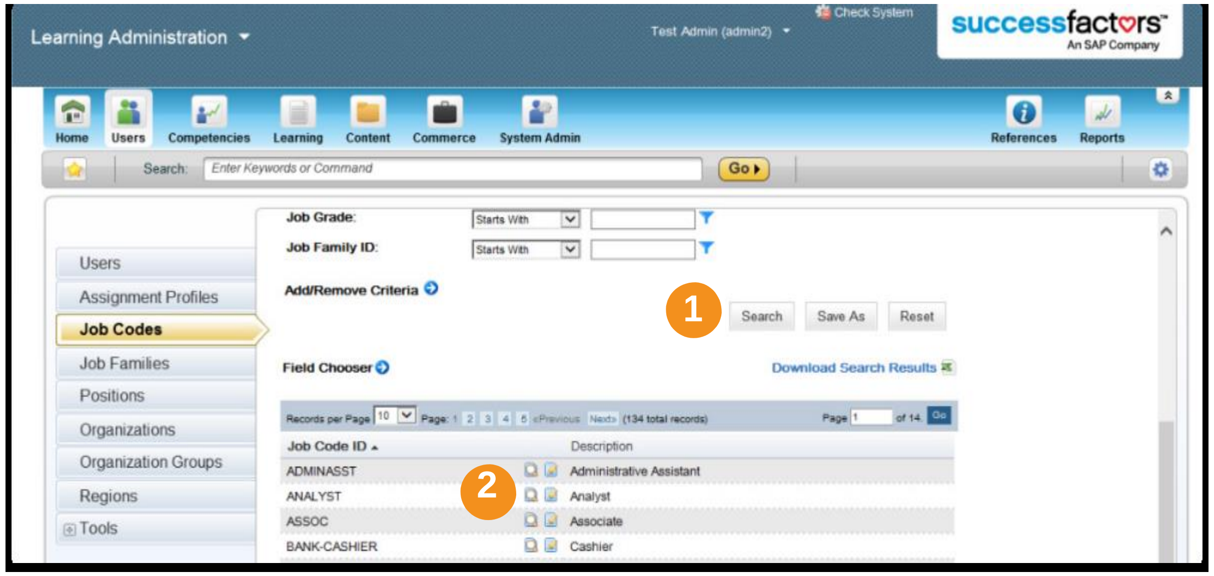


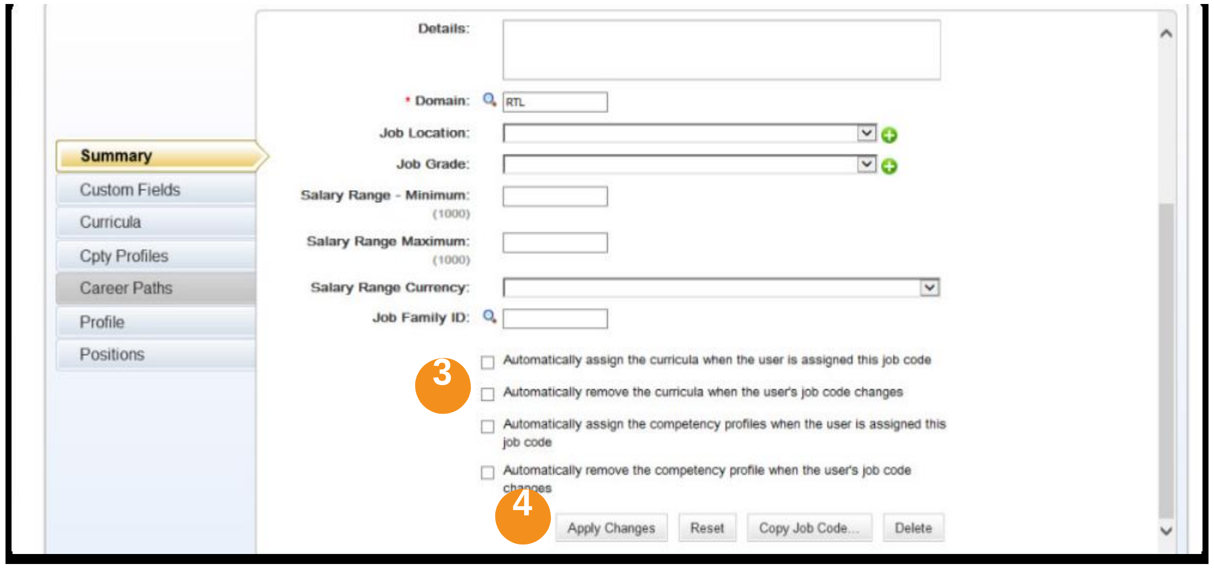
Automated Learning Assignments: Step by Step

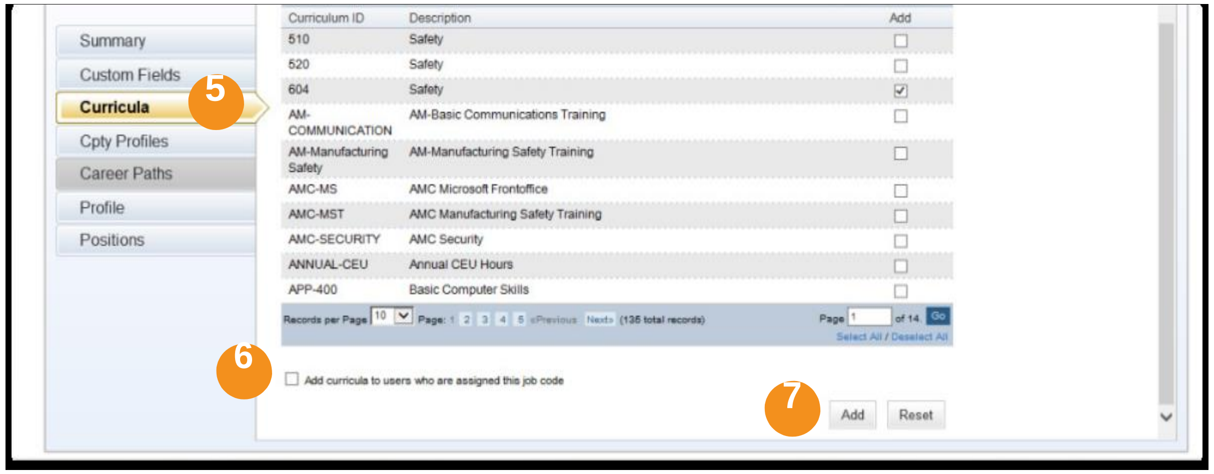
Associate a Curriculum to a Job Code

***Admin Tools* > *Learning* > *Learning Administration* > Learning > Users > Job Codes**

1. Enter criteria to search for the desired job code and click ***Search***.
2. Click the ***Edit*** icon to access the job position record in edit mode.
3. Click the ***Automatically assign the curricula when the user is assigned this job code*** and ***Automatically remove the curricula when the user's job code changes*** checkboxes.
4. Click ***Apply Changes***.
5. Select the ***Curricula*** tab and click the add one or more from list link.
6. Check the ***Add curricula to users who are assigned this job code*** checkbox.
7. Click ***Add***.





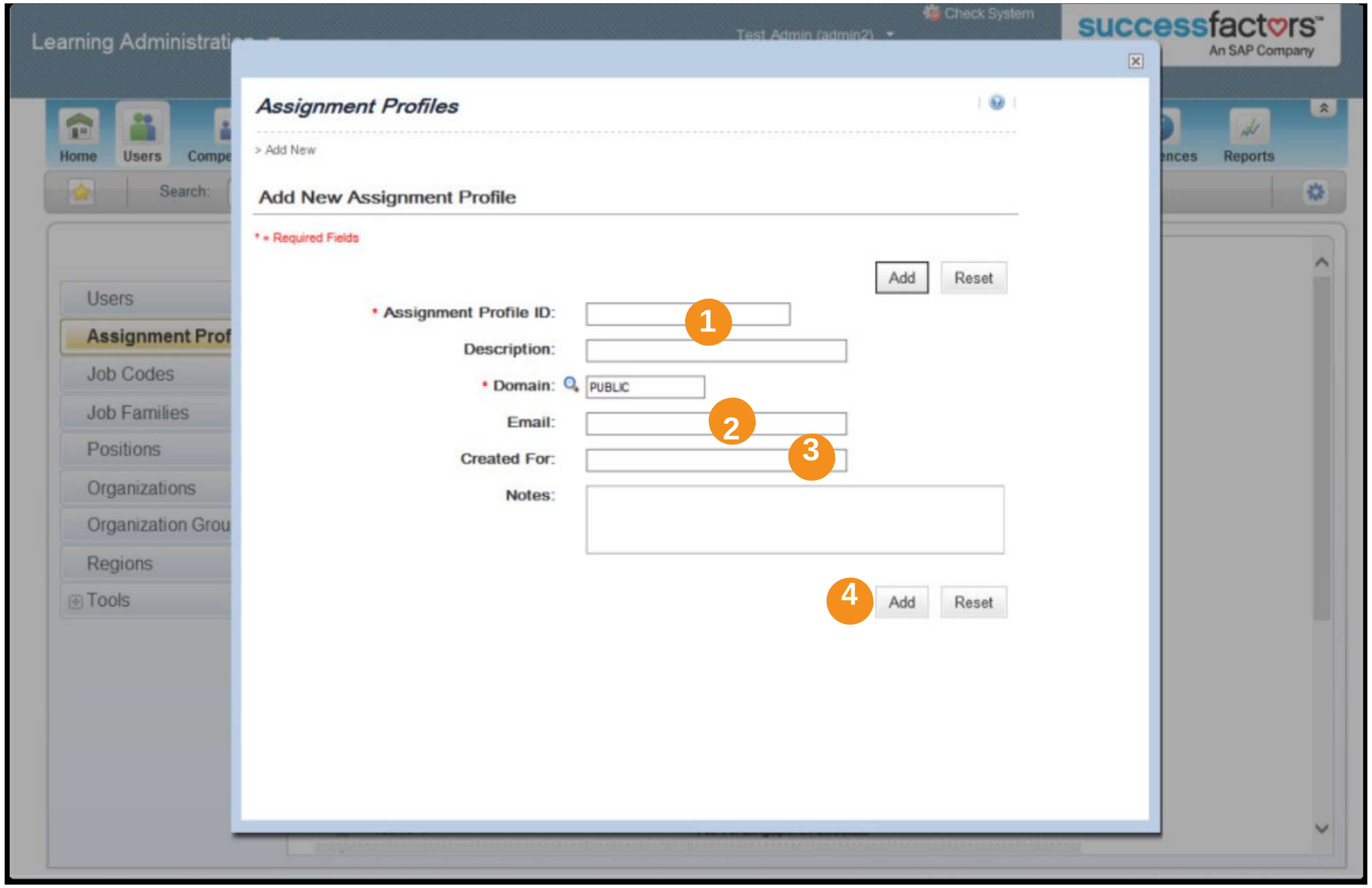


Automated Learning Assignments: Step by Step

Add a New Assignment Profile

***Admin Tools > Learning > Learning Administration* > Learning > Users > Assignment Profiles**

1. Enter an ***Assignment Profile ID*** and description and select a ***Domain***.
2. Enter an ***Email*** address for the person responsible for the assignment profile.
3. Enter the ***Created For*** information. This identifies the person who requested the assignment profile to be created.
4. Enter any applicable notes and click ***Add***.

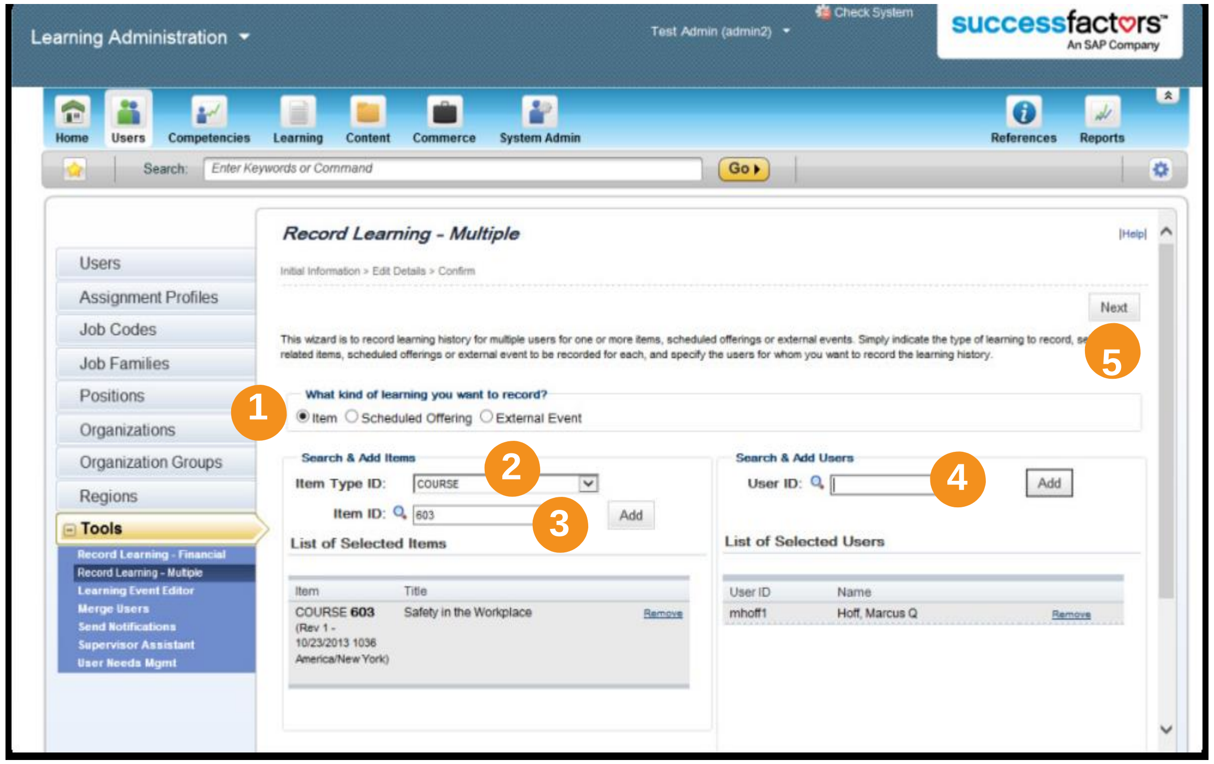


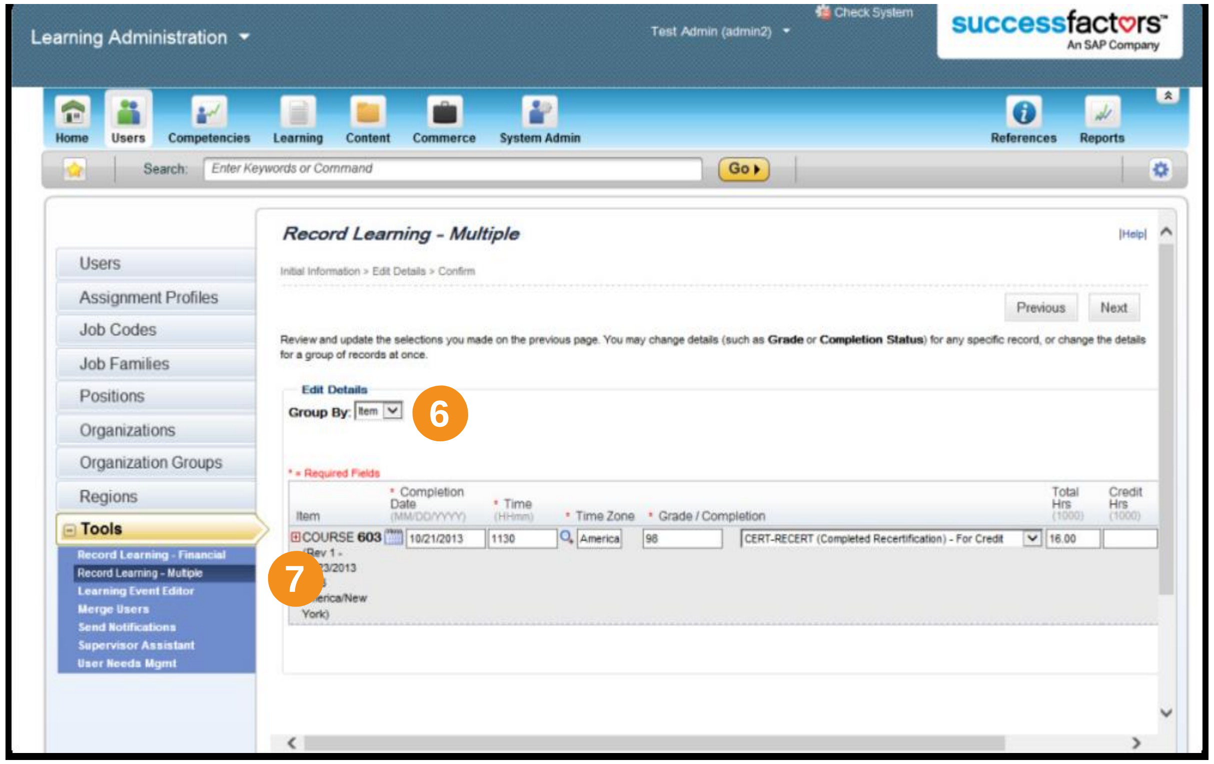
Overview: Step by Step

Record a Learning Event

***Admin Tools* > *Learning* > *Learning Administration* > Learning > Users > Tools > Record Learning - Multiple**

1. Select the ***Item*** radio button. **NOTE:** To record a learning event for an external event, click the ***External Event*** radio button.
2. In the ***Search & Add Items*** section, select the ***Item Type ID*** from the drop-down menu.
3. Enter the ***Item ID***, and click ***Add***.
4. In the ***Search & Add Users*** section, enter the ***User ID*** and click ***Add***.
5. Click ***Next***.
6. In the ***Edit Details*** section, enter details for the item such as completion date and time, time zone, grade or completion status, and total hours.
7. Click the ***expand*** icon to view details for each user. If the details are different for each user, change the item details accordingly and click ***Next***. Then click ***Submit***.



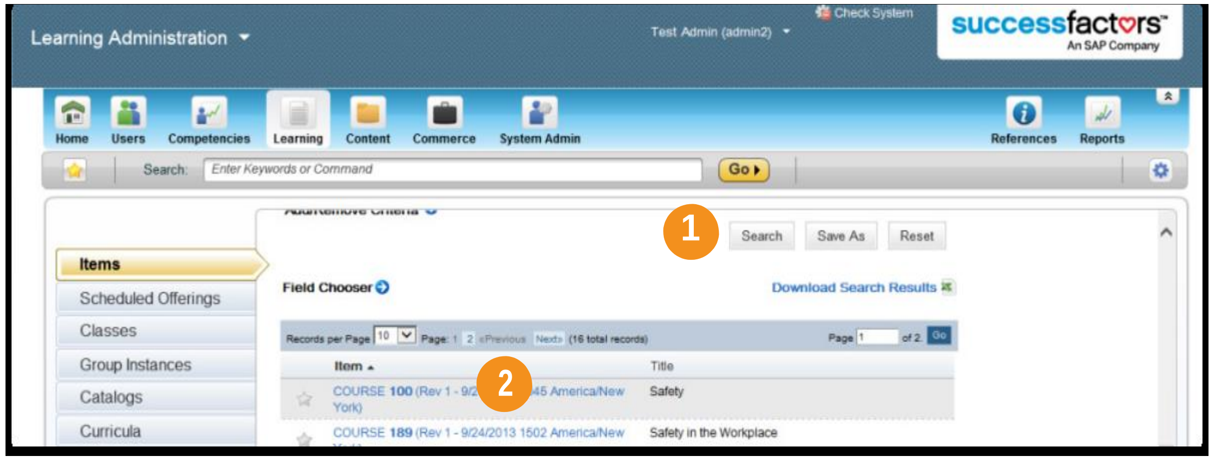


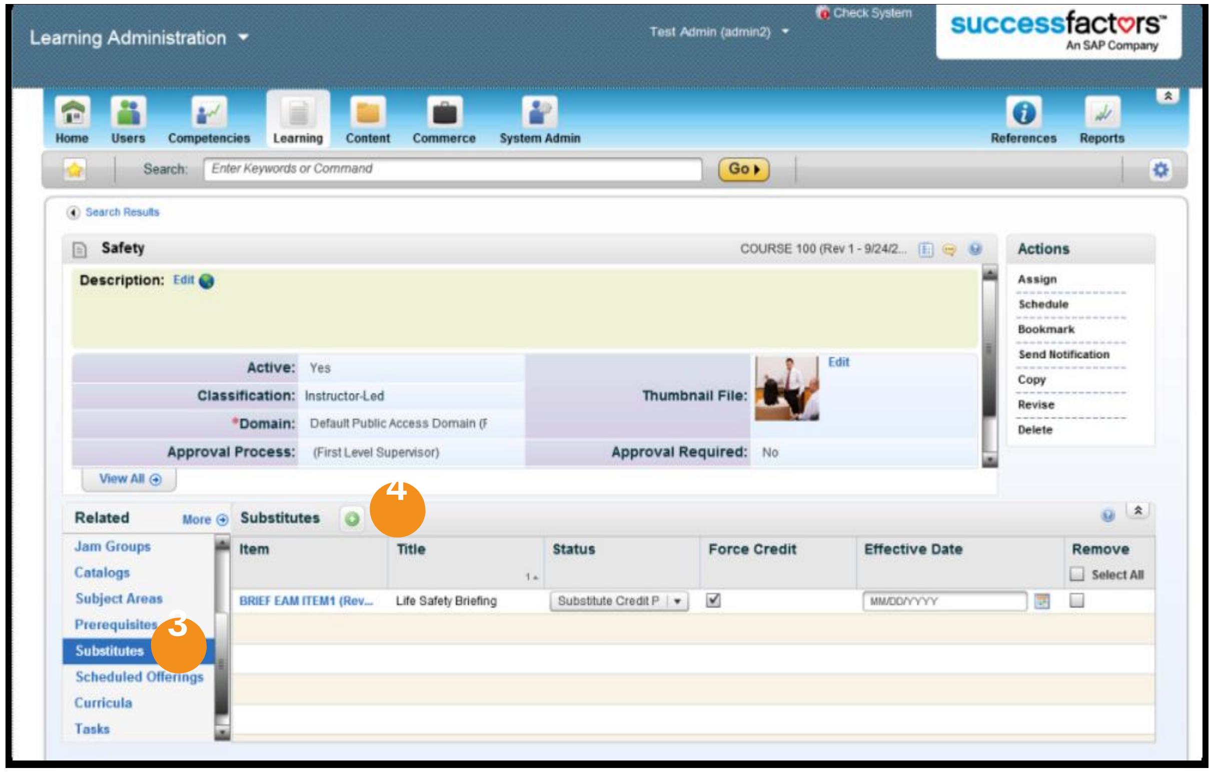
Substitutes and Prerequisites: Step by Step

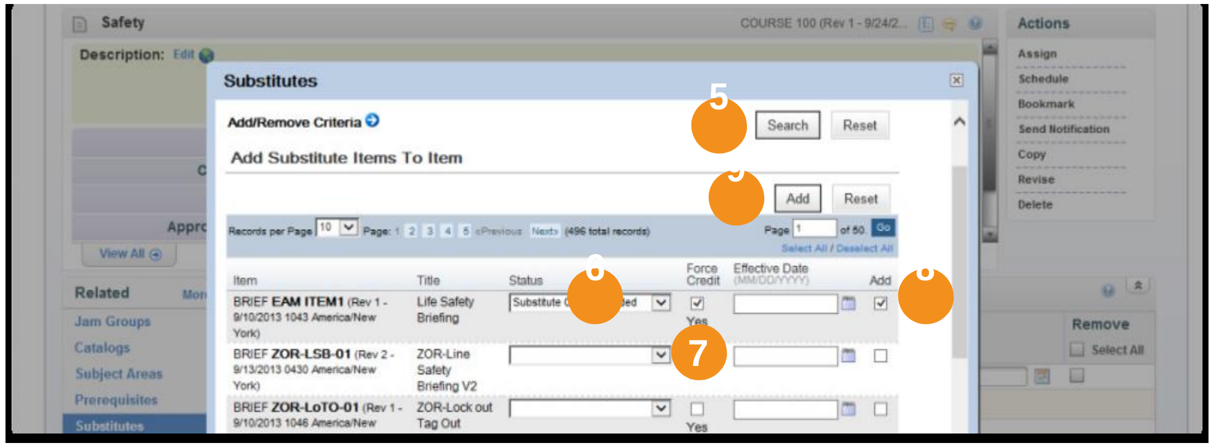
Establish a Substitute Relationship

***Admin Tools* > *Learning* > *Learning Administration* > Learning > Items**

1. Enter criteria to search for the item that will grant substitute credit and click ***Search***.
2. Select the item for which you would like to establish a substitute relationship.
3. Select the ***Substitutes*** tab from the Related area.
4. Click the ***Add New Substitutes*** button.
5. Enter criteria to search for the item that will grant substitute credit and click ***Search***.
6. Select the completion status ***Substitute Credit*** from the Status drop-down menu.
7. Check the ***Force Credit*** checkbox. If you would like to apply retroactive substitute credit, enter an effective date.
8. Click the ***Add*** checkbox.
9. Click ***Add***.





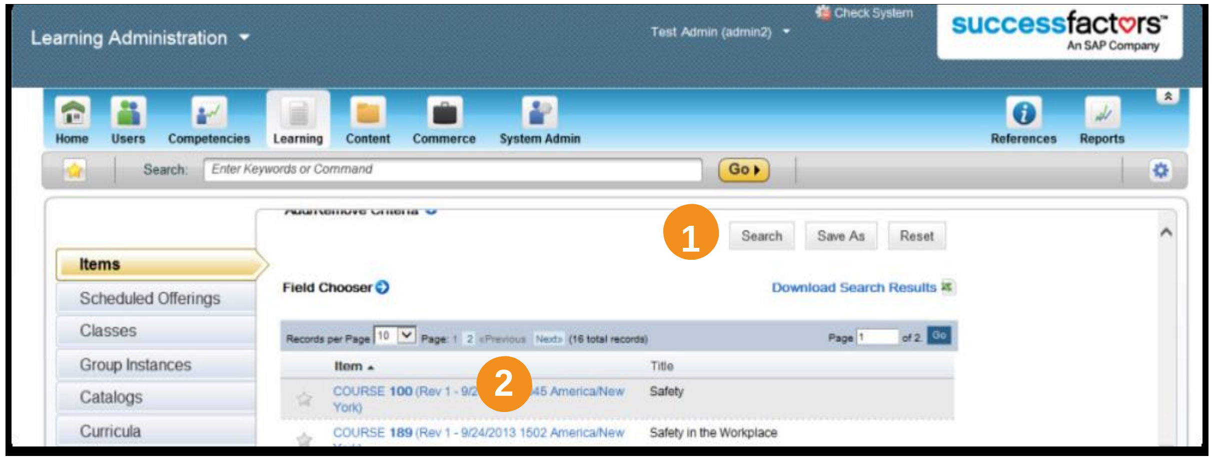


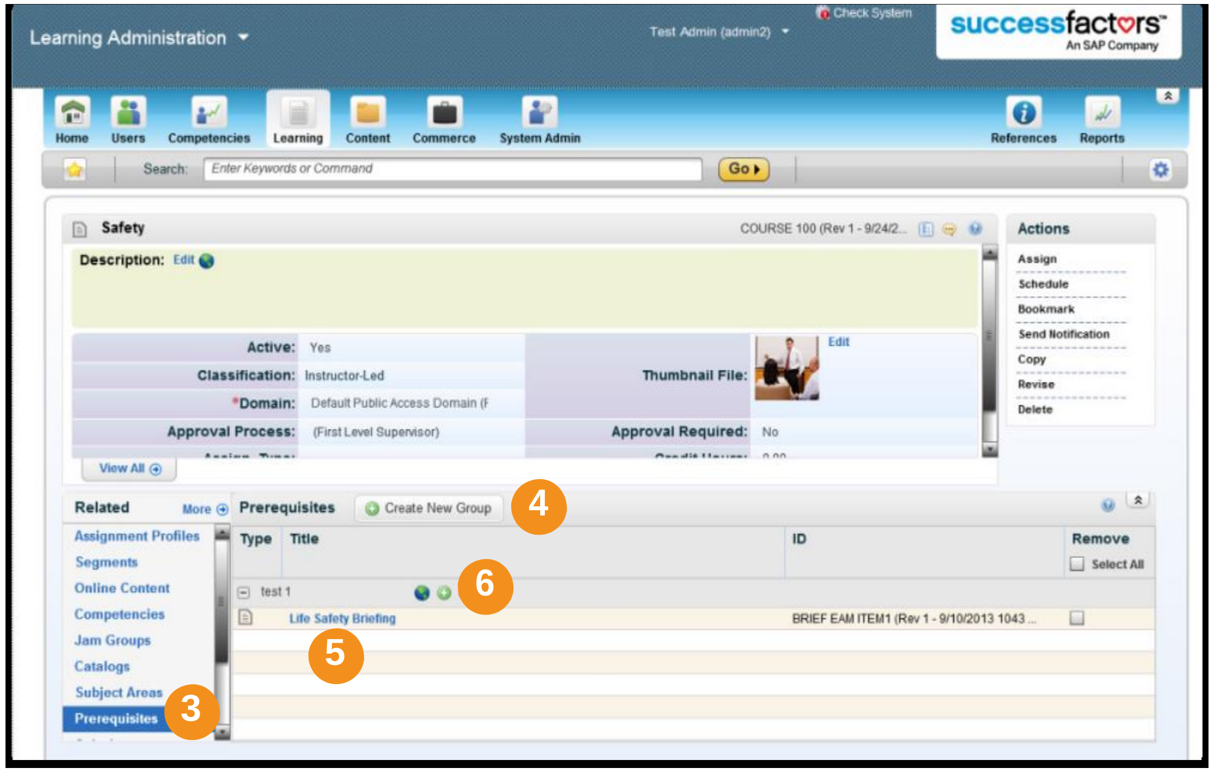
Substitutes and Prerequisites: Step by Step

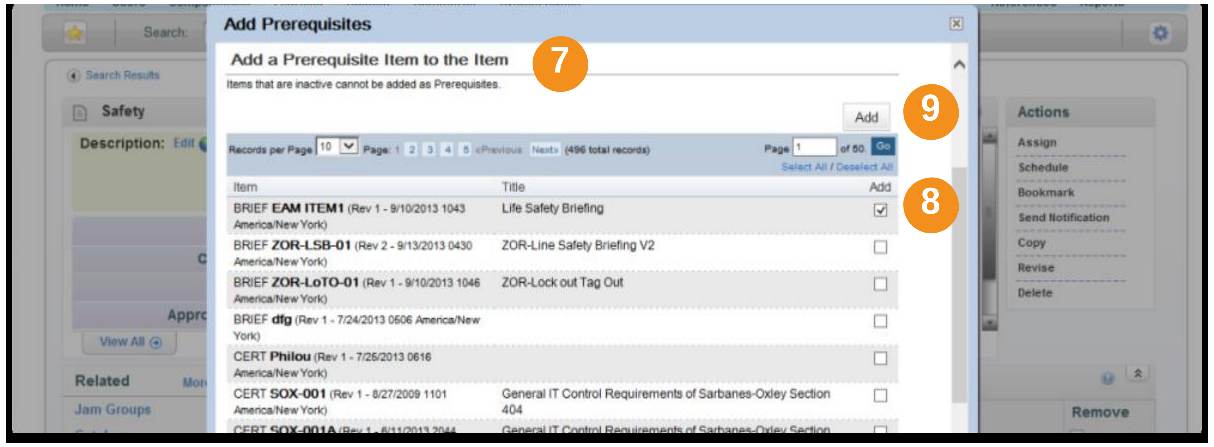
Establish a Prerequisite Relationship

***Admin Tools* > *Learning* > *Learning Administration* > Learning > Items**

1. Enter criteria to search for the item for which you would like to establish a prerequisite and click ***Search***.
2. Select the item for which you would like to establish a prerequisite relationship.
3. Select the ***Prerequisites*** tab from the ***Related*** area of the item.
4. Click ***Create New Group***.
5. Enter a title for the group and click ***OK***.
6. Click the add item icon next to the name of the group you just created.
7. Enter criteria to search for the item which will be a prerequisite for the first item and click ***Search***.
8. Check the ***Add*** checkbox next to the desired item.
9. Click ***Add***.







Requirements-Based Curricula: Step by Step

Required Dates Editor

Admin Tools > Learning > Learning Administration > Learning > Tools > Required Dates Editor

Step 1:

1. Select ***Required Dates Editor*** from the drop-down menu.
2. Click the ***Add one or more from list*** link to add users.
3. Click ***Next***.

Step 2:

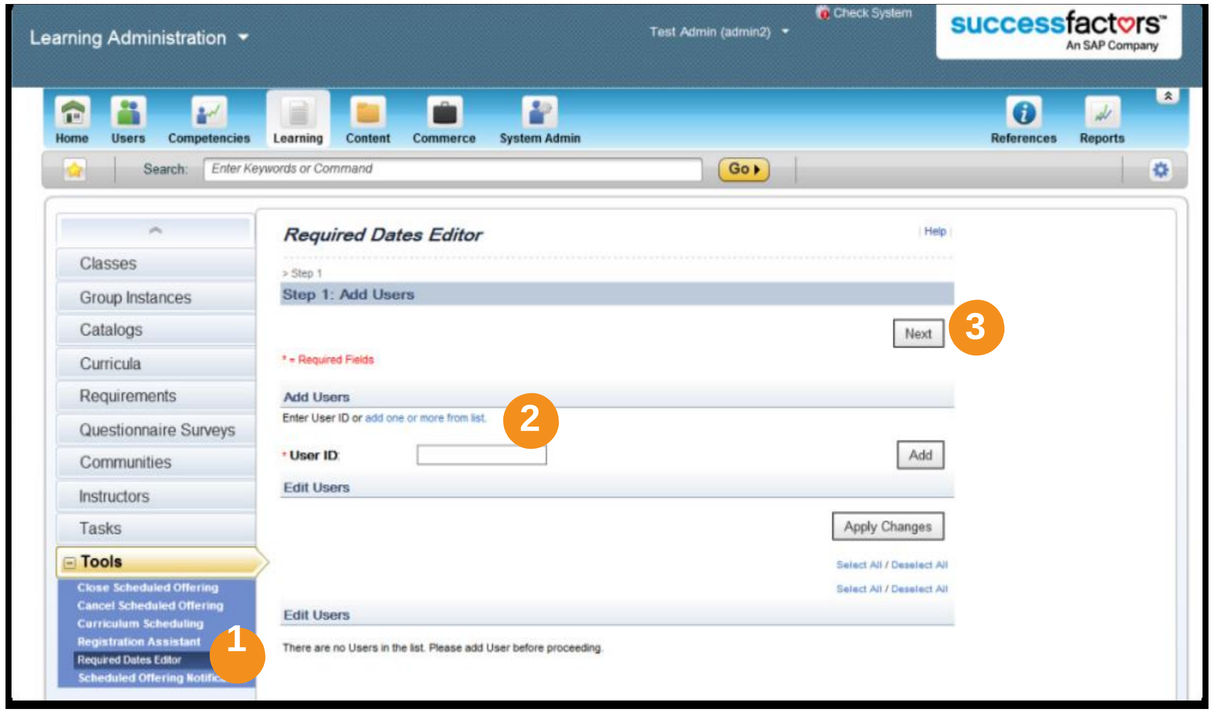
4. Click the ***Add one or more from list*** link to search for curricula to add and click ***Search***.

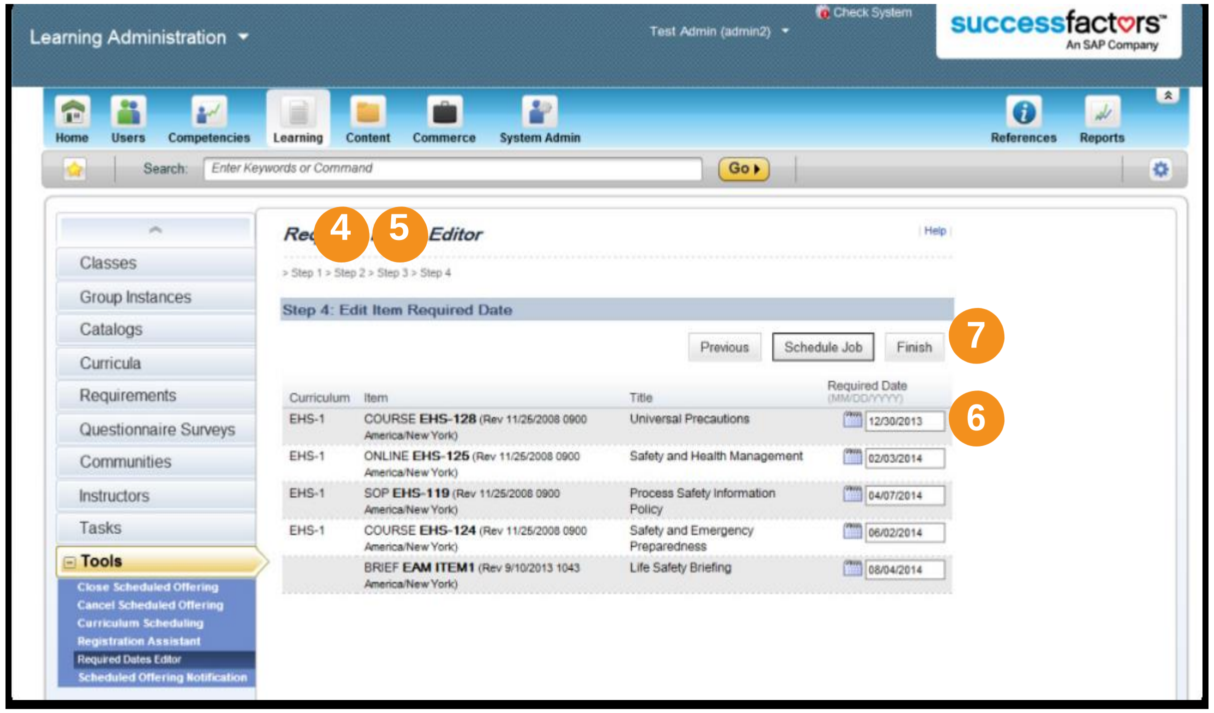
Step 3:

5. Click the ***Add one or more from list*** link to search for free-floating items to add and click ***Search***.

Step 4:

6. Enter a new required date for each item listed.
7. Click ***Finish***.

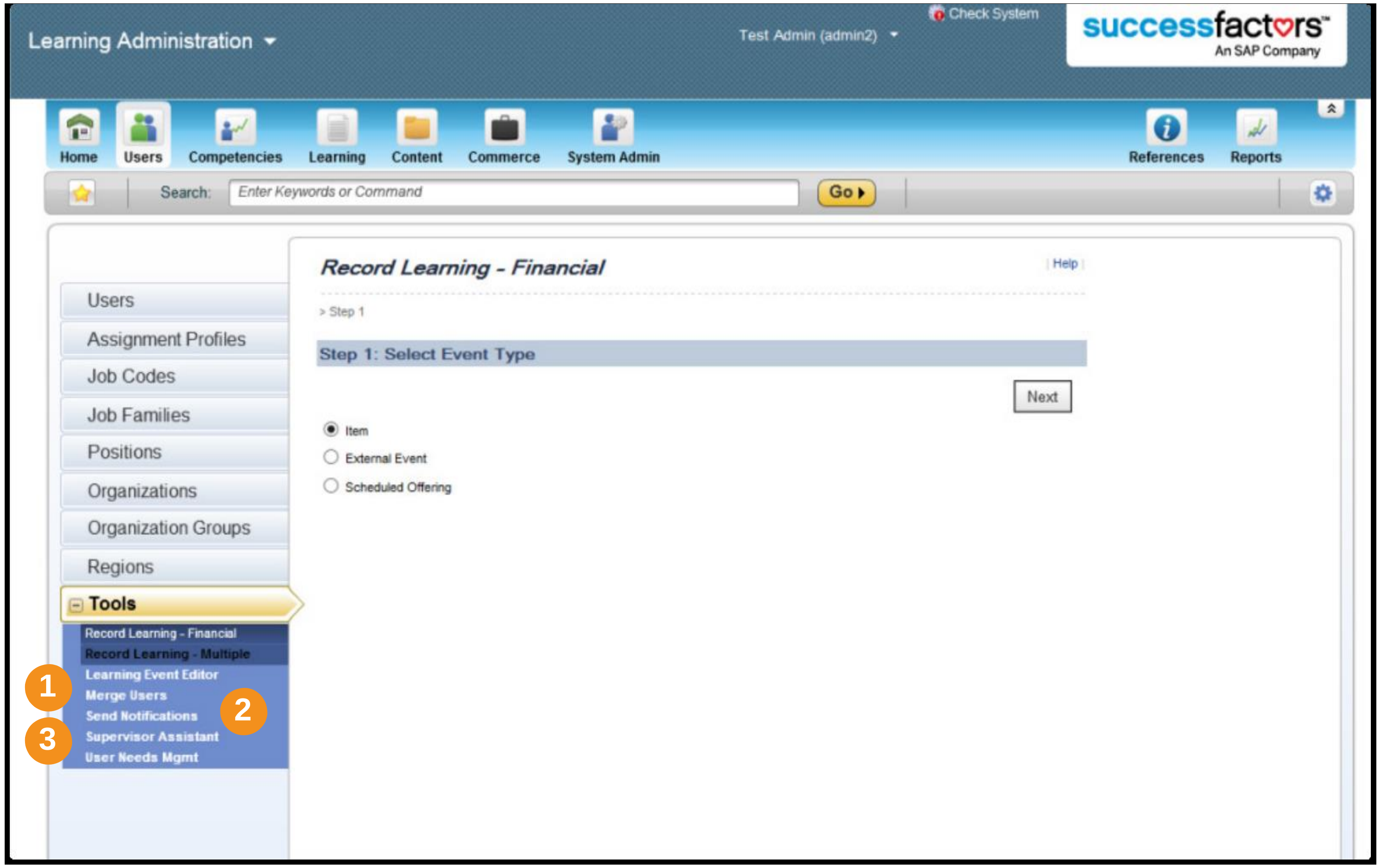




Learning Extras: User Management Tools

The tools in User Management allow you to address various situations that might occur, such as contacting users to inform them of an update or correction, supervisors leaving the organization, or the existence of multiple user records for the same user.

Admin Tools > Learning > Learning Administration > Learning > Users > Tools



1 Merge Users

In cases where two records represent the same user, consolidation requires transferring learning assignments and learning events. When merging users, the primary and secondary user records are known as Merge Into and Merge From, respectively.

2 Notification Assistant

The ***Send Notifications*** wizard identifies a group of users and then sends a message to them as an ad-hoc notification. An ad-hoc notification broadcasts email through SuccessFactors Learning like a standard notification, but you control to whom it is sent and when, rather than the system automatically grouping and sending the notification.

3 Supervisor Assistant

The ***Supervisor Assistant*** provides a quick and easy way to reassign multiple subordinates to a new supervisor if a supervisor leaves the organization, is promoted, or reassigned.

Spotlight:
Electronic Signatures, or e-sigs, are a second layer of security used for recording a learning event that is associated with the selected item and/or curriculum. In addition to user names and passwords, some Talent Management installations require a personal identification number, or PIN, for some regulated actions.